

This is Financial Services Guide (Part 2) and sets out specific details about Josh as an Authorised Representative of Grimsey Wealth. This document should be read in conjunction with Financial Services Guide (Part 1).



## Introducing your financial adviser

Your Financial Adviser is Josh Wingrove  
(Authorised Representative 000421889)

When you first deal with Josh, it will become apparent that your goals are his main priority. He takes great pride in building and maintaining long-term relationships with his clients, while keeping them accountable along the way to ensure they reach their goals. Josh believes and adopts the highest standards of ethics and compliance and is an active member of the Association of Financial Advisers (AFA).



## Qualifications and memberships

- Bachelor of Commerce
- Diploma of Financial Services (Financial Planning)
- Diploma of Financial Services (Mortgage Broking)
- Fellow Chartered Financial Practitioner (FChFP)
- Member of the Association of Financial Advisers (AFA)

### Does your Financial Adviser have any associations or relationships that may influence their advice?

Josh is employed by Pursue Wealth, which is a wholly owned subsidiary of the Grimsey Group. As part of our advice, you may be referred to other entities within the Grimsey Group for related services including accounting, taxation, business advisory, SMSF administration, lending or mortgage services. Where you are referred to another Grimsey entity, the associated fees will be fully disclosed to you prior to the services being arranged.

This Financial Services Guide (Part 2) has been authorised for distribution by the authorising licensee:

Grimsey Wealth Pty Ltd ('Grimsey Wealth')  
ABN 90 113 911 247  
Australian Financial Services  
Licence No. 293334 ('AFSL')

### CONTACT DETAILS

Should you have any questions you are able to contact Josh using the following details:

Level 4, 80 Market St,  
SOUTH MELBOURNE VIC 3205

Phone: (03) 9686 1784

Email: [josh@pursuewealth.com.au](mailto:josh@pursuewealth.com.au)

Website: [www.pursuewealth.com.au](http://www.pursuewealth.com.au)

### How can you provide your instructions to your Financial Adviser?

You may provide instructions by using any of details provided in this Financial Services Guide. Where instructions are provided by telephone, these must be confirmed in writing. Alternatively, you may provide instructions in person.

### How do we protect your personal information?

In addition to the information provided in the Financial Services Guide (Part 1) on how we collect, hold, use, disclose and manage your information, further detail regarding our commitment to your privacy can be found at <https://www.pursuewealth.com.au/pw-privacy-policy/>.



## Financial products and services

Josh is authorised by Grimsey to provide financial advice to wholesale and retail clients in the following areas:

- Budget and cashflow
- Savings strategies
- Investment planning
- Superannuation planning for accumulation and retirement phases
- Self-Managed Superannuation Funds
- Centrelink strategies
- Insurance planning
- Gearing and margin lending strategies
- Debt management
- Estate planning considerations
- Aged care advice
- UK pension transfer strategies
- Wholesale client advice
- Tax Advice

Josh is authorised by Grimsey to provide financial advice on the following product types:

- Deposit products
- Managed investments
- Superannuation
- Life insurance
- Margin lending
- Securities
- Government debentures, stocks & bonds

Josh is not authorised to provide financial advice on the following product types:

- Derivatives



## Service and advice fee structure

All fees and commissions disclosed in this Financial Services Guide (Part 1 and Part 2) which are attributed to the services provided to you, by Josh, are paid to Grimsey Wealth.

Grimsey Wealth receives all fees and commissions payable for the services provided under licence. Josh receives a salary as an employee of Pursue Wealth and may also receive distributions as a director of Pursue Wealth Pty Ltd, Pursue Property Pty Ltd & Grimsey Wealth Pty Ltd, determined by the companies as appropriate from time to time.

Your initial appointment is complimentary. At this meeting, Josh Wingrove will explain how Pursue Wealth Pty Ltd operates, what you can expect and the payment options. All fees and commissions payable by you will be explained to you at the time advice is given and will also be detailed in a Statement of Advice, Record of Advice and Product Disclosure Statement(s).